

**CITY OF SANTA BARBARA
COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM
CDBG/HS APPLICATION PROCESS**

FREQUENTLY ASKED QUESTIONS

(This document will be updated as new questions are posed)

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FREQUENTLY ASKED QUESTIONS

What is the City's FY 2012-2013 CDBG entitlement amount?

The City will not receive confirmation of the actual FY 2012 CDBG Entitlement amount from HUD until at the earliest, March 2012. For this application process, we are anticipating the same amount as FY 2011-2012 (approximately \$970,185), plus an additional \$142,596 in reprogrammed funds. Using these estimates, the approximate amount of Public Service CDBG funds equal \$145,528 which is added to City Human Service funds. The approximate amount of Capital CDBG funds equal \$723,216.

What is the City's General Requirements for applicants?

- A. Agencies must provide at minimum, comprehensive general and automobile liability insurance in the amount of not less than \$1,000,000 per occurrence and aggregate, professional liability, Worker's Compensation as required by law, and any other applicable insurance as required by law. Agencies not familiar with City insurance requirements are strongly encouraged to review the complete insurance requirement documents prior to applying (available on request).
- B. Agencies will agree to comply with S 504 Handicapped Regulations. Agencies will be required to execute a Handicapped Nondiscrimination Statement (available on request).
- C. Agencies must agree to abide by the City's Non-Discriminatory Employment Certificate (available on request).
- D. Agencies must meet specific "Financial Management and Accounting Standards" (available on request).

What are the City's Combined Criteria that apply to applicants?

The following criteria apply to programs applying for Community Development Block Grant and/or Human Services funds:

- A. Programs should primarily benefit low and moderate-income residents.
- B. Programs must address specific social or physical needs and conditions of the people they propose to serve. Documentation could include social indicators, demographic data, surveys, community plans and need as perceived by potential consumers.
- C. Programs must present a marketing strategy, which includes specific efforts to reach ethnic communities.

For questions not answered here: call Administrative Staff (805) 564-5461

Email: estotts@santabarbaraca.gov or drandolph@santabarbaraca.gov

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- D. Programs must demonstrate support from the people for which the program is proposed.
- E. Agencies must clearly identify all funding sources and justify proposal if services are available through another source.
- F. Agencies shall seek funding, or demonstrate funding support from other public/private sources. The City shall not be committed to total support of a program nor shall the City be committed to continue funding in the case where other support is withdrawn.
- G. City funds should support only those services that directly benefit residents of the City of Santa Barbara. Programs operated on a county or regional basis must show documentation that (a) services benefit City residents, and (b) sufficient funds are available to support non-city residents.
- H. Administrative costs shall be held to a minimum and will be scrutinized during the program review process.
- I. Programs shall identify geographical areas where they propose to provide services.
- J. Programs that pay the local minimum wage (as described in Chapter 9.128 of the City of Santa Barbara Municipal Code) to all staff for which CDBG/Human Services funds are requested shall receive an extra point in the rating process.

What are the CDBG Eligibility and Funding Priorities?

An applicant for CDBG funds must be eligible under the Federal Register, Department of Housing and Urban Development, 24 Code of Federal Regulations, Community Development Block Grants. If you question your eligibility, **you must contact** Liz Stotts, Community Development Programs Specialist, or Deirdre Randolph, Community Development Programs Supervisor to discuss your proposal and the basic eligible activities.

What are the Funding Priorities for the CDBG program (Capital Projects only)?

- A. Proposals that facilitate housing for low and moderate-income persons.
- B. Proposals which revitalize downtown neighborhoods (Census Tracts 8.01, 8.02, 9, 10, 11.02 and 12.04).
- C. Proposals that strengthen or expand public or social service agencies that facilitate low and moderate-income housing.
- D. Economic development proposals which leverage financial resources to create or retain jobs for low and moderate-income persons.

What are the Public/Human Services Funding Priorities?

Programs shall use Public/Human Service funds to provide direct services; funds shall not be used for capital improvements or mortgage payments.

Funding Priorities for the Public/Human Services program are:

First Priority: Services that help meet basic human needs **and** programs that directly relate to City-initiated collaborative efforts, such as the South Coast Gang Task Force and the Strategies to Address Community Issues Related to Homelessness in the City of Santa Barbara;

Second Priority: Programs that are preventative in nature and/or promote the highest degree of functioning the individual is capable of achieving;

Agencies must present a clear and compelling argument for funding under the priorities as described.

When are applications due?

Midnight December 12, 2011

What is the schedule for review, interviews and approval?

Staff Reviews Applications	Upon Submission
Applications Reviewed by CDHSC	January 9 - February 28, 2012
Applications Available to CDHSC	January 9, 2012
Notification of Interview Date and Time (the week of)	January 17, 2012
Applicant Interviews	February 2, 7, 9, 14, 16, 2012 (4:00 - 9:00pm)
CDHSC Meeting to Rank Applications	February 21, 2012
CDHSC Subcommittee Meeting to	February 24, 2012
Formulate Recommendations	
CDHSC Meeting on Recommendations	February 28, 2012
Funding Recommendations Available	Wednesday, February 29, 2012
to City Council and Public	(Tentative)
City Council Public Hearing	Tuesday, March 27, 2012
on Committee Recommendations	(6:00 P.M., Council Chambers) (Tentative)
City Council Action	Tuesday, March 27, 2012 (Tentative)

How do we attach required attachments to the application?

If a document does not APPLY to your agency or program, you must submit in its place a MEMO to Administrative Staff referencing the Attachment. The memo should contain the

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reasons the document does not apply to your agency or program. Acceptance of Memo in lieu of document is subject to approval by Administrative Staff.

Templates are provided for several of the documents. **YOU MUST USE THE PROVIDED TEMPLATE.** To download the required template, click on the link "download template" which is located immediately below the name of the form, save the file to your computer, input your project information, save the file with a file name that refers to the document and your agency and makes sense (ex: AgencyNameBoardofDirectorsRoster.pdf) and select "upload". After you have successfully uploaded your file and **REFRESHED** your browser, you will see your file listed in the Uploaded Documents column on the Zoomgrants page.

Documents that do not require use of a template may be uploaded in any format (Word, Excel, pdf, jpg, etc).

REMINDER: There is a 10MB file size maximum. If you are trying to upload a file that is larger than 10MB please split the document into two files, name appropriately, and upload both files into the appropriate row.

I have applied before and have already submitted these documents:

7. IRS FEDERAL TAX EXEMPT status letter – submit even if submitted previously.
8. STATE OF CALIFORNIA FRANCHISE TAX BOARD LETTER ATTESTING EXEMPT STATUS – submit even if submitted previously.
9. ARTICLES OF INCORPORATION (stamped by CA. Secretary of State) – submit even if submitted previously.

Why am I required to submit again this year?

The City of Santa Barbara is, in its effort to go paperless, creating an electronic file for each applicant. If you apply next year, you will not be required to re-submit documents already in your electronic file.

Multiple Applications

If we are submitting multiple CDBG/HS applications, will our agency have to submit multiple copies of the supporting documents such as the tax forms, audit report, and other required documents?

If your agency is submitting multiple applications, only one copy of the following are required:

FINANCIAL AUDIT REPORT – covering the most recently completed Fiscal Year including MANAGEMENT LETTER. Should audit be incomplete, submit unaudited Financial Statement. Do NOT submit audits for prior years.

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IRS 990 TAX RETURN – covering the most recently completed Fiscal Year. If not complete, submit a full copy of EXTENSION submitted. Do NOT submit tax returns for prior years.

IRS FEDERAL TAX EXEMPT status letter

STATE OF CALIFORNIA FRANCHISE TAX BOARD LETTER ATTESTING EXEMPT STATUS

ARTICLES OF INCORPORATION (stamped by CA. Secretary of State)

All other attachments are required for EACH application.

A specific attachment does not apply to my Agency or Program. What do I do?

Upload a memo referencing the Attachment Number/Name and provide a **brief** explanation as to why the attachment will not be submitted. A memo submitted in lieu of submitting the required document is subject to Administrative Staff approval.

What Time Periods are covered by the Application?

PRIOR YEAR:July 1, 2010 – June 30, 2011
(or your Agency's prior FY --must match audited financial statements)
CURRENT YEAR:July 1, 2011 – June 30, 2012
PROPOSED YEAR:July 1, 2012 – June 30, 2013

What are the City's Current Living Wage Amounts?

LIVING WAGE RATES for JULY 1, 2011 to June 30, 2012:

\$15.75 with no benefits;
\$13.50 with medical insurance provided at no cost; and
\$12.38 with medical insurance provided at no cost and a supplemental benefit.

Living Wage: The living wage question only applies to agency/program employees whose salary will be assisted with CDBG/HS funds. If it does not apply, enter n/a.

Non-profit organizations are not required to pay a living wage, but those agencies that do will receive an extra point in the rating process.

In order to receive the extra credit point, all employees whose salary is assisted with CDBG/HS funds must be paid the current Living Wage.

Living Wage Definitions: Following are the definitions related to the Living Wage Incentive, per Santa Barbara Municipal Code Title 09, Chapter 9.128.

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BASIC MEDICAL INSURANCE COVERAGE. For the purposes of this Chapter, Basic Medical Insurance Coverage must include, but need not be limited to, offering the employee insurance coverage for the following health and medical care expenses of the Employee:

1. Emergency hospital care and hospitalization care with the payment of a patient co-pay amount not exceeding the maximum per emergency room visit and hospitalization care co-pay and patient deductible amount paid by a City employee under the City's medical insurance coverage plans;

2. Prescription medication coverage with the payment of a patient co-pay amount not exceeding the maximum per prescription co-pay and patient deductible amount paid by a City employee under the City's medical insurance coverage plans;

3. Access to preventative medical care by a licensed physician or surgeon with the payment of a co-pay and patient deductible amount not exceeding the maximum per visit co-pay amount paid by a City employee under the City's medical insurance coverage plans.

COMPENSATED LEAVE TIME. For the purposes of this Chapter, the term "Compensated Leave" shall mean the following:

1. Full-Time Employees. Providing not less than three (3) compensated days off per calendar quarter worked to each full-time Employee.

2. Part-Time Employees. Providing the appropriate pro-rated portion of the Compensated Leave required by Subsection (F)(1) above to each part-time Employee, with the pro-ration being that percentage of time the part-time Employee has worked per week (on average) during the previous twelve weeks, with forty hours per week being the equivalent of 100 percent.

3. Full-Time and Part-Time Employee Defined. For the purposes of this section, a "full-time" Employee shall mean an employee who has worked for the Service Contractor forty (40) or more hours per week on average for any ten (10) weeks of the previous twelve-week period. Any Employee who is not a full-time Employee is a part-time Employee.

"Compensated Leave" shall mean that the Employee is allowed leave time and is compensated at the same rate of pay which he or she would have received had they worked a regular day of work for each day of leave time used by the Employee.

Nothing herein shall preclude an Employer from imposing a minimum employment period upon the use of compensated leave provided such minimum period is consistent with the requirements of state law. (Ord. 5384, 2006.)

SUPPLEMENTAL EMPLOYEE BENEFITS COVERAGE. For the purposes of this Chapter, Supplemental Employee Benefits Coverage must include, in addition to Basic Medical Insurance Coverage and Compensated Leave for the Employee, offering to the Employee both of the following:

1. Basic Medical Insurance Coverage for the Employee's spouse, domestic partner, or family (at the Employee's option) with the Employee's share of the cost of the medical insurance coverage provided not exceeding five percent (5%) of the Employee's average gross monthly wages for the previous twelve months;

and at least one of the following additional supplemental Employee benefits:

2. An Employee pension or deferred compensation retirement plan under circumstances where the Service Contractor offers to make an Employer contribution to the plan of not less than five percent (5%) of the Employee's average gross monthly wages for the previous twelve (12) months, and where the plan is regulated and recognized by the federal

Employee Retirement Income Security Program Act (hereinafter referred to as "ERISA," 29 USCA §1001 et seq.);

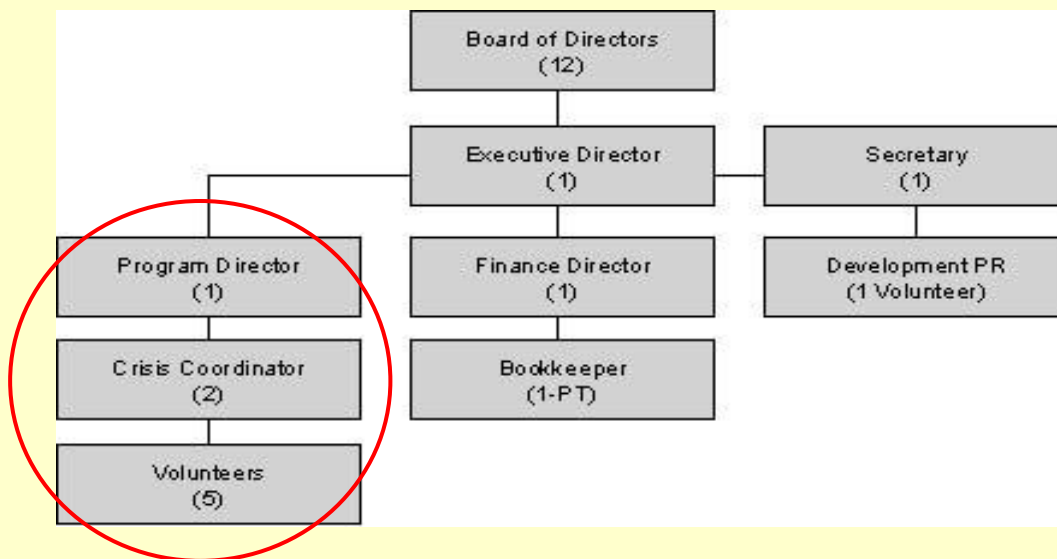
3. Child care or "dependent" care (or monetary assistance for child or dependent care needs) for a dependent(s) of the Employee under circumstances where the cost of the child or dependent care is funded or paid in full by the Employer and where the care is duly licensed and certified by the State. For the purposes of this Chapter, the term "dependent" shall be as that term is used and defined in the federal Internal Revenue Code.

4. The equivalent of Ten (10) Eight (8) hour days of Compensated Leave to the Employee over and above the Compensated Leave as such Compensated Leave is defined in Section 9.128.010(F) hereof.

5. Any additional employee benefit or employee benefit program which the City's Living Wage Advisory Committee, at the request of a City Service Contractor, deems appropriate to qualify as an optional Supplemental Employee Benefit under this subsection E. Examples of additional benefits or benefit programs which may qualify under this subparagraph would be the following: 1. dental insurance coverage for the Employee and the employee's family; 2. life and accidental death or disability insurance for the Employee; 3. medical or health insurance plans which provide out-patient services, such as physical therapy, speech therapy, or mental health or substance abuse counseling and assistance.

What should the Organization Chart show?

It should show all positions within your organization and circle the proposed program as it relates to the whole agency. Insert the number of persons within each position. For example:



What are the City's Insurance requirements?

THE FOLLOWING IS THE INSURANCE LANGUAGE INCLUDED IN FUNDING CONTRACT:

As part of the consideration of this Agreement, Grantee agrees to purchase and maintain at its sole cost and expense during the life of this agreement insurance coverage as specified in 1),

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2), and 3) described below. All insurance coverage shall be placed with insurers that have a Best rating of no less than B+: XII; and are admitted insurance companies in the State of California. All other insurers require prior approval of the City.

General and Automobile Liability: Combined single limits of not less than One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate of General Liability and One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate of Automobile Liability insurance, including Bodily Injury and Property Damage. Such insurance shall include the following seven (7) items.

Extension of coverage to City, its officers, employees and agents, as additional insureds, with respect to Consultant's liabilities hereunder in insurance coverage identified in item "1." above, but only as respects to the operations of the named insured. A copy of the endorsement evidencing that the City of Santa Barbara has been added as an additional insured on the policy, must be attached to the certificate of insurance.

A provision that coverage will not be cancelled or subject to reduction until at least thirty (30) days' prior written notice has been given to the City Clerk, addressed to P.O. Box 1990, Santa Barbara, California 93102-1990.

A provision that Consultant's insurance shall apply as primary, and not excess of, or contributing with the City.

Contractual liability coverage sufficiently broad so as to include the liability assumed by the Consultant in the indemnity or hold harmless provisions included in this Agreement.

A Cross Liability clause, or equivalent wording, stating that coverage will apply separately to each named or additional insured as if separate policies had been issued to each.

Broad form Property Damage Endorsement.

Policy shall apply on an "occurrence" basis.

Workers' Compensation: In accordance with the provisions of the California Labor Code, Consultant is required to be insured against liability for Workers' Compensation or to undertake self-insurance. Statutory Workers' Compensation and Employers' Liability of at least \$1,000,000 shall cover all Consultant's staff while performing any work incidental to the performance of this agreement. The policy shall provide that no cancellation, major change in coverage or expiration shall be effective or occur until at least thirty (30) days after receipt of such written notice by City.

Professional Liability: Professional Liability (Errors and Omission) insurance with limits of liability of not less than One Million Dollars (\$1,000,000) to cover all services rendered by the Consultant pursuant to this Agreement. Said policy shall provide that City shall be given thirty (30) days written notice prior to cancellation or expiration of the policy or reduction in coverage.

Approval of the insurance by City or acceptance of the certificate of insurance by City shall not relieve or decrease the extent to which the Consultant may be held responsible for payment of

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damages resulting from Consultant's services or operation pursuant to this Agreement, nor shall it be deemed a waiver of City's rights to insurance coverage hereunder.

Contractor must provide evidence that it has secured the required insurance coverage before execution of this agreement. A Certificate of Insurance supplied by the City evidencing the above shall be completed by Consultant's insurer or its agent and submitted to the City prior to execution of this Agreement by the City. Consultant shall exercise due diligence to require all subcontractors and all tiers of such subcontractors to provide General and Automobile Liability, Workers' Compensation, and Professional Liability insurance as set forth in 1), 2), and 3) of this section.

If, for any reason, Consultant fails to maintain insurance coverage which is required pursuant to this Agreement, the same shall be deemed a material breach of contract. City, at its sole option, may terminate this Agreement and obtain damages from the Consultant resulting from said breach. Alternately, City may purchase such required insurance coverage, and without further notice to Consultant, City may deduct from sums due to Consultant any premium costs advanced by City for such insurance.

Capital Projects: Bids

We are in the process of completing a formal contractor's bid. Should we seek the other two bids at this time, in anticipation that it will be required if we receive a CDBG award?

No. Only one completed bid for your proposed CDBG project will need to be submitted as part of the application packet. As a reminder, the completed bid must be from a licensed contractor that includes applicable Davis Bacon federal wage rates in the determination of the total project budget. Your agency will need to let them know that providing the bid doesn't guarantee they will get the work.

Capital Projects: Extension

Funded CDBG capital projects are expected to be completed by April 30. If toward the end of the project timeline it is determined that an additional two months are needed to complete the project, can an extension be requested?

That depends on where the project is at the time of the request. Extensions will be determined by the Community Development Director on a case by case basis. The project must be underway with expenditures incurred and invoices submitted to the City at the time of the request and realistic completion by June 30 (contract expiration date) is assured. A formal request for extension must be submitted to the CDBG Administrative staff. They will submit it to the Community Development Director who will make the decision. In addition, the grantee is required to appear before the CDHSC committee, present their reasons for the requested extension, and answer the committee's questions, if any.

CDBG Terminology

1. Family

All persons living in the same household who are related by birth, marriage or adoption.

2. Household

All persons who occupy a housing unit. The occupants may be a single family, one person living alone, two or more families living together, or any other group of related or unrelated persons who share living arrangements.

3. Income

Entitlement grantees may select any one of the following three definitions of income:

- (i) Annual income as defined at 24 CFR 5.609 (except that if the CDBG assistance being provided is homeowner rehabilitation under 24 CFR 570.202, the value of the homeowner's primary residence may be excluded from any calculation of net family assets);
- (ii) Annual income as reported under the Census long-form for the most recent available decennial Census; or
- (iii) Adjusted gross income as defined for the purpose of reporting under Internal Revenue Service (IRS) Form 1040 for individual Federal annual income tax purposes.

4. Income Limits

City of Santa Barbara Community Development Block Grant and Human Services Program Maximum Income of Various Income Categories Effective June 2011									
Category	% of Median	<<<<<<<Household Size>>>>>>>							
		1	2	3	4	5	6	7	8
Median	100				\$72,300				
Very Low	50	\$25,350	\$26,950	\$32,550	\$36,150	\$39,050	\$41,850	\$44,850	\$47,750
Low	89	\$40,500	\$46,300	\$52,100	\$57,850	\$62,500	\$67,150	\$71,750	\$76,400

5. Unduplicated Clients

Clients are defined as recipients of actual services, persons for whom you would maintain a case file. Do Not include casual contacts or "facility users" for whom no direct services are provided. An individual who receives assistance is only counted once, regardless of the frequency of visits or the number of times a client accesses program services. For example, a person who receives emergency food each month is only counted as one unduplicated client. Service statistics such as 12 distributions can be reported in the objectives.

A blank line under Other Characteristics is available for clients not already listed, such as Non-English speaking, Pregnant, HIV-Positive, etc.

Prior Year Client Data must represent the **actual** (should match reports submitted) number of unduplicated people served. Current Year Client Data is a projection of the number of unduplicated people to be served during the current year (**if you have a CDBG or Human Services contract this year you must use the objective numbers from your contract**). Proposed Year Client Data is an estimate of number of unduplicated people to be served during the proposed contract period.

6. Program Goals and Objectives:

This is the single most important item of your proposal and due emphasis should be placed in its completion.

The Program Goal statement must reflect a statement of conditions/situations to be influenced, changed or maintained.

Program Objectives must not be a restatement of the goals but rather should be stated in specific measurable terms. To be measurable, an objective must be stated in countable terms within a specific time frame. You may count either services or outcomes.

Some examples of service terms are "person", "visits", "rides", "hours", and "meals".

Examples of outcomes are "grade level", and "recidivism rate". In order to make a measurable objective, a projected number and time must be added to each term.

The following are examples of measurable objectives:

"To reduce the high school drop-out rate by 20% within a period of 6 months by providing appropriate after-school activities."

"To provide an average of 200 rides per week to 100 low income senior citizens."

"To maintain an average daily attendance of 35 children."

The following are unacceptable objectives:

"To provide after-school activities."

"To provide transportation to senior citizens."

"To provide child care."

These are not measurable. There is no estimate of the time, the number of persons to be served, or the number of services to be provided. The addition of time and number of persons, as in the earlier examples, can make these statements measurable.

Objectives substantially differing in service type, clientele, and purpose should not be consolidated and submitted as one objective.

Prior Year Objectives must represent **actual** accomplishments. Current Year Objectives are a projection of the entire current year (if you have a CDBG or Human Services contract this year you must use the objective numbers from your contract). Proposed Year Objectives are an estimate of accomplishments to be completed during the proposed contract year.

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Improperly completed or stated objectives may affect your funding request. If you have questions, call OR email Community Development Programs Staff for further clarification and instruction.

7. Fees/Donations:

Payments by clients for receipt of program services be they voluntary or mandatory, are considered program income. Upload a copy of your fee/ donation schedule.

What does the Community Development and Human Services Committee do?

A thirteen-member committee appointed by the City Council will review applications, interview agencies and make funding recommendations to the City Council.

The City Council makes final decisions on funding.

The Community Development and Human Services Committee includes representatives of the following groups:

- Youth-Oriented Services
- Business/Economic Development Community
- Human Services
- Latino Community
- African American Community
- Senior citizens
- Housing Interests
- Four (4) Low Income Neighborhoods: Eastside, Westside, Downtown, and Lower Westside
- Disabled Community
- Housing Authority Representative

When is the Interview?

Notification of Interview Date and Time (the week of).....January 17, 2012

Applicant Interviews February 2, 7, 9, 14, 16, 2012

City Staff will notify you of the date and time of your interview. They are typically held between 4:00 p.m. and 9:00 p.m. on the dates shown above.

What happens at the Interview?

At the scheduled interview, agencies will be allowed a 4-minute presentation, with 10 minutes for questions from the Committee, and an agency response/final statement.

Who needs to be at the Interview?

Agencies are required to have a member of the Board of Directors and appropriate staff present at the interview.

May our Agency present a Powerpoint?

ONLY Capital Projects applicants may use PowerPoint to show images of the improvements needed as part of the 4-minute presentation.

CAPITAL Applicants wishing to make a PowerPoint presentation must submit the file to estotts@santabarbaraca.gov by January 31, 2012.

What Criteria are used by the CDHS Committee?

- Eligibility
- Priority
- Need for service
- Quality of the program and its administration
- Cost effectiveness of the service to be provided
- Fiscal management
- Ability to implement the project and expend funds within the fiscal year. HUD may requisition unused or inappropriately used funds.
- Completeness of proposal

To ensure that verbal presentations made by agency representatives are accurate and reasonable, applicants are advised that information provided to the Committee plays an important factor in formulation of specific funding recommendations; furthermore, statements made by an applicant upon which the Committee relies in making a funding recommendation shall become binding and included as part of any contract which may be executed.

Agencies should come prepared to justify their proposal within the priorities outlined.

Applicants are further advised that the Committee may request additional information on any part of the proposal after the scheduled interview. Applicants will be required to respond in writing within 3 days of such request.

How can my Agency Increase Board Diversity?

Working Definitions*

Diversity: describes the spectrum of human differences and similarities. It refers to the composition of people associated with the organization.

Inclusion: describes the way an organization configures opportunity, interaction, communication, information and decision-making to utilize the potential of diversity. It refers to the organizational environment.

*developed from discussion at the 1998 Netter Seminar at Cornell University, Ithaca, NY

(From 2000©Workplace Diversity Network, 11/25/2000)

- ☆ Diversity and multiculturalism must be institutionalized to become part of organizational culture. This requires changing practices and norms considered standard in the past.
- ☆ There are many ways to undertake diversity efforts, including task forces or committees to steer initiatives. The work of diversity is participatory and often takes place through teams, including representatives from all levels in an organization. Such mechanisms handle problem solving and provide a vehicle for dealing with internal culture and policies.
- ☆ Respecting and valuing diverse staff and board members contributes to successful efforts.
- ☆ Expanding an organization's staff or board as a method of diversifying is a way to initiate such a change in culture. Recruitment of multicultural decision-makers may require cultivating and identifying different networks of candidates from outside an organization's economic and social circles.
- ☆ Employment benefits are a signal of an institution's commitment to become an inclusive, multicultural workplace. Acknowledgement of multicultural holidays, domestic partner benefits and policies, and workplace accommodations for people with disabilities indicate institutional awareness and attract diverse staff.

Written materials are essential.

- ☐ Include a commitment to diversity in key statements. Develop written materials that communicate diversity objectives.
- ☐ Committed organizations articulate the importance of diversity through their institution's mission, vision, values, and/or funding strategy.
- ☐ Statements and organizational policies that reflect the centrality of diversity formalize institutional commitment and establish a standard of accountability.

Educate the field about the need for diversity.

- ☐ Inform boards and trustees about the value of diversity.
- ☐ Training can increase understanding and improve communications at the outset of any diversity initiative. Training for managers is fundamental. Outside professionals often undertake training, passing on concrete skills that managers can then use to train other staff.

Diversity is a conscious, ongoing process.

- ❑ Planning, dedicating the resources required, and evaluating progress are central as diversifying takes time, energy, and perseverance.
- ❑ Establish clearly defined internal goals, responsibilities and accountability mechanisms.
- ❑ Focus groups, surveys, and/or diversity audits can assess an organization's diversity climate and identify areas of concern and desired outcomes.
- ❑ Consultants can provide expertise and impartiality. The presence of individuals not invested in internal organizational dynamics offers perspective and a distance that can make it easier to raise issues likely to cause conflict.

Expect consequences and readjust.

- ❑ If one aspect of an organization's program or structure changes to become more diverse, it frequently causes a ripple effect throughout the organization.
- ❑ Anticipate some failures, internal resistance and departures. A willingness to change systems and remove institutional barriers is a must.
- ❑ More consideration needs to be given to sustained diversity efforts over time.

(Adapted from: The Meaning and Impact of Board and Staff Diversity in the Philanthropic Field: Findings from a National Study. Joint Affinity Groups 135 Conclusion: Findings and Recommendations)